



Contents

About This Document 2

Overview 2

Eligibility 2

Contractual Agreement 2

Procedures 3

Eligible Expenses 3

 Housing Hunting 3

 Moving 4

 Vehicles 5

 Temporary Storage 5

 Final Transportation & Accommodation 6

 Employee Precedes Family 6

 Temporary Accommodation 7

 Interim Accommodation 7

 Former Residence 7

 New Location Residence 8

 Allowance for Miscellaneous Expenses 8

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- ◆ When relocating existing employees or new hires, create a contract or an addendum to the employment contract that addresses the terms and conditions relating to relocation assistance and specifically addresses situations that require repayment by the individual.

Procedures

1. All efforts related to coordinating, scheduling, and obtaining quotes for relocation are the responsibility of the employee.
2. Payments that will result in financial gain to the employee will not be made, nor will expenses resulting from misinterpretation of quotes, estimates, etc., or calculation errors be reimbursed.
3. Relocation assistance may be provided in the form of a lump sum allowance, or by reimbursement of expenses for which original receipts are provided.
4. Maximums for lump sum allowances or reimbursements with original receipts will differ from one situation to another. Both scenarios must be estimated, discussed, and approved in advance with the Hiring Manager in consultation with CUSTOMIZER: Insert appropriate title.
5. Relocation assistance by way of reimbursed expenses must be accompanied by original receipts and must be submitted for payment no later than CUSTOMIZER: Example - 3 months after the move.
6. All proposals and estimates for relocation assistance must be approved in advance, in writing, by CUSTOMIZER: Insert approval authority title.

Eligible Expenses

CUSTOMIZER: Insert Company Name may provide assistance with the following types of relocation expenses:

Housing Hunting

1. A house-hunting trip up to a maximum of CUSTOMIZER: Example - 5 days may or may not be provided. It is only permitted if it is cost effective and necessary. The Company reserves the right to decrease the maximum of CUSTOMIZER: Example - 5 days if the employee is familiar with the new location.
2. Researching and organizing house-hunting services and housing options are the responsibility of the employee. The employee may wish to hire a consultant who specializes in relocation

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- l. Shipping heavy or massive items such as airplanes, solaria, outboard motors, trailers, large mowers or farm equipment
 - m. Shipping antique cars or cars that are not operable
 - n. Unusual crating requirements for antiques, paints, furniture, collections, musical instruments, electronic equipment, etc.
 - o. Charges for gaining access to stored items
 - p. Cleaning, fumigating, or moth proofing
 - q. Replacing locks
 - r. Tuning of pianos or other instruments
7. The Company reserves the right to exclude or disallow from shipment:
 - a. Articles of unusual size or weight
 - b. Articles that are not considered to be household furnishings
 - c. Articles that require special handling, preparation, or transport
8. Special insurance for items of special value are the employee's responsibility. This includes items such as antiques, paintings, jewelry, collections, furs, and musical instruments.

Vehicles

9. The Company will pay for the cost of moving a minimum of 1 vehicle up to a maximum of 2, or the cost of driving them to the new location.
10. If the distance is less than CUSTOMIZER: Example - 500 miles, highway vehicles are to be driven and not shipped.
11. Automobiles will not be shipped if they are not operational.
12. The Company reserves the right to limit shipping costs to the book value of the automobile.

Temporary Storage

13. The employee is expected to coordinate their vacancy date at the former location with the date of occupancy at the new location in such a way that temporary storage of household goods is not required.
14. If temporary or in-transit storage of household goods is **unavoidable**, the Company will pay for storage costs (CUSTOMIZER: Example - up to 30 days).

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Temporary Accommodation

22. Temporary accommodation applies to the period during which household goods are being packed, shipped, and unpacked at the new location.
23. The Company will pay for:
 - a. In addition to the days en route, CUSTOMIZER: Example - 2 days of temporary accommodations if required during the time it takes to ship the household goods to the new location.
 - b. Per diems.

Interim Accommodation

24. In unusual circumstances, when unloading and unpacking does not immediately follow the arrival of the household goods, interim accommodation may be authorized.
25. If the new residence cannot be occupied due to reasons beyond the employee's control, interim accommodations and per diems may be provided for a period not to exceed CUSTOMIZER: Example - 10 days.
26. An employee who chooses to build or buy a house that is not yet completed will not be eligible for interim accommodation or other allowances beyond the CUSTOMIZER: Example - 10 day period.

Former Residence

27. The Company may pay mortgage discharge penalties up to a maximum of CUSTOMIZER: Example - 3 months mortgage interest.
28. The employee will be responsible for all costs related to interim financing, bridge financing, temporary loans, or other financial arrangements in connection with the sale of the property.
29. Homeowners who decide to rent their former residence may claim the cost of legal fees and advertising to obtain a tenant.
30. When the employee and dependents are occupying a permanent residence at the new location, and the former residence remains vacant prior to renting, the operating costs of the former residence is the responsibility of the employee (e.g. taxes, insurance, mortgage payments, utilities, and other operating costs).
31. The Company will pay for legal fees associated with selling the former residence.

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